

CLAIMS

What is claimed is:

5

1. A method for organizing a plurality of items which are being tracked in a computing device of the type which is capable of exchanging information with a communications center, comprising the steps of

10

maintaining a data list which includes all of the plurality of items being tracked;

including in the data list a category tag for each of the plurality of items being tracked; and

15

displaying in a sublist associated with a designated category tag all of those items in the data list which have the designated category tag.

2. The method of claim 1 further including the step of limiting the number of items being tracked to a predetermined number.

20

3. The method of claim 1, wherein securities are included among the plurality of items being tracked.

25

4. The method of claim 1, wherein the computing device is a personal organizer device.

5. The method of claim 4, wherein the personal organizer device is a hand held device.

6. The method of claim 1, further including the step of displaying a running total of the number of items in the data list.

7. The method of claim 6, further including the step of displaying
5 the maximum number of items permitted in the data list.

8. The method of claim 3, further including the step of displaying the running today of the number of items in the data list, and the maximum number of items permitted in the data list.
10

9. The method of claim 1, wherein the data maintaining step includes the step of adding new items to the plurality of items being tracked by way of entering an identifier for each new item.

10. The method of claim 9, wherein the new item adding step includes the step of supplying a category tag for each new item.
15

11. The method of claim 10, wherein the new item adding step includes the step of requiring the user to delete at least a selected one
20 of the plurality of items being tracked whenever the number of items being tracked will exceed a predetermined limit number because of the addition of the new item.

12. The method of claim 1, wherein the displaying step includes
25 the step of including selected information about the items being displayed in the sublist which information includes information received from the communications center.

13. The method of claim 1, wherein the maintaining step
30 includes the step of displaying all of the items in the data list.

14. A system for tracking a plurality of items comprising
a device in which information related to each of the plurality of
the items being tracked is maintained in a data list, wherein the related
information for each of the plurality of items includes a classification tag;
5 and
a central communications center which is capable of exchanging
with the computing device the related information of the items being
tracked;
wherein the computing device is capable of displaying a list of all
10 of the plurality of items being tracked by identifier and the associated
classification tag; and is capable of displaying sublists of the plurality of
the items being tracked organized by classification tag along with
information about the items in the displayed sublists.
- 15 15. The system of claim 14 wherein the computing device is a
portable device.
16. The system of claim 14 wherein the computing device is a
hand held device.
20
17. The system of claim 14 wherein the items being tracked
are securities.
18. The system of claim 14 wherein the plurality of items being
25 tracked is limited to a preselected number.
19. The system of claim 14, further wherein the computing
device displays a running total of the number of items in the data list.
- 30 20. The system of claim 14, further wherein the computing
device displays the maximum number of items permitted in the data list.

21. The system of claim 18, further wherein the computing device displays the running total of the number of items in the data list, and the maximum number of items permitted in the data list.

5

22. A computing device which is capable of exchanging information with a central communications center, which information is related to a plurality of items being tracked by a user, the computing device comprising

10

a data list in which information is maintained for each of the plurality of items being tracked including a user-supplied classification tag;

15

a display function which is capable of displaying the plurality of items being tracked in lists organized by common classification tags.

23. The computing device of claim 22 wherein the computing device is a portable device.

20

24. The computing device of claim 22 wherein the computing device is a hand held device.

25. The computing device of claim 22 wherein the items being tracked are securities.

25

26. The computing device of claim 22 wherein the number of items being tracked is limited to a predetermined number.

27. The system of claim 22, further wherein the computing device displays a running total of the number of items in the data list.

30

28. The system of claim 22, further wherein the computing device displays the maximum number of items permitted in the data list.

29. The system of claim 26, further wherein the computing
5 device displays the running total of the number of items in the data list, and the maximum number of items permitted in the data list.

30. A software program which is adapted for execution in a computing device of the type which is capable of exchanging
10 information with a central communications center, the applications program comprising

a data list in which information is maintained for each of a plurality of items being tracked by a user, wherein the information for each item includes an associated one of a plurality of user-supplied
15 classification tags;

a display function which is capable of displaying the data list and of displaying lists of ones of the plurality of items being tracked which have common classification tags, along with information about the items in the lists which has been obtained from the central communications
20 center.

31. The software program of claim 30 wherein the computing device is a portable device.

25 32. The software program of claim 30 wherein the computing device is a hand held device.

33. The software program of claim 30 wherein the items being tracked are securities.

30

34. The software program of claim 30 wherein the number of items being tracked is limited to a predetermined number.

35. The system of claim 30, further wherein the display function
5 displays a running total of the number of items in the data list.

36. The system of claim 30, further wherein the display function displays the maximum number of items permitted in the data list.

10 37. The system of claim 34, further wherein the display function displays the running today of the number of items in the data list, and the maximum number of items permitted in the data list.